Comprehensive User Guide

# WORDPRESS

ClickCom.com

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## WordPress: Its Origins

I like to begin WordPress introductions with a little history about the program's use. Originally, this program was built as a blogging tool. Multiple people would contribute to a single "blog", including Editors, Subscribers, and more.

Many of the confusing options, layouts, and terminology have it's roots in this original use for the program. These include:

- **The "Recent Drafts" portion of the main dashboard.** This area was meant as a 'quick link' box for Editors of a blog to find the most recent blogs the Contributors had written. They'd find the blog, edit it, and "Publish" it!

- **The "User" Types.** The title "Contributor" or "Editor" doesn't really fit most company's "Website Administrator", and the need for multiple users is very low in WordPress's use as a Content Management System.

It has been modified for use as a Content Management System. You have virtually total control of your site's content. Read on to learn the possibilities!

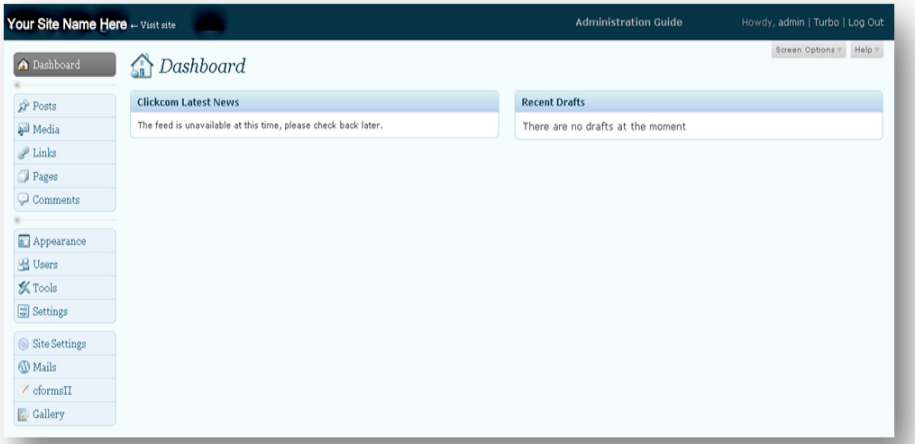
## Logging In

- ClickCom provides each of their clients with their log-in information and site domain name.
- To access the admin, simply type 'wp-admin' after your domain:
    - Example Domain: http://clickcom.com/
    - Domain's Admin: http://clickcom.com/wp-admin

# Administrator Dashboard

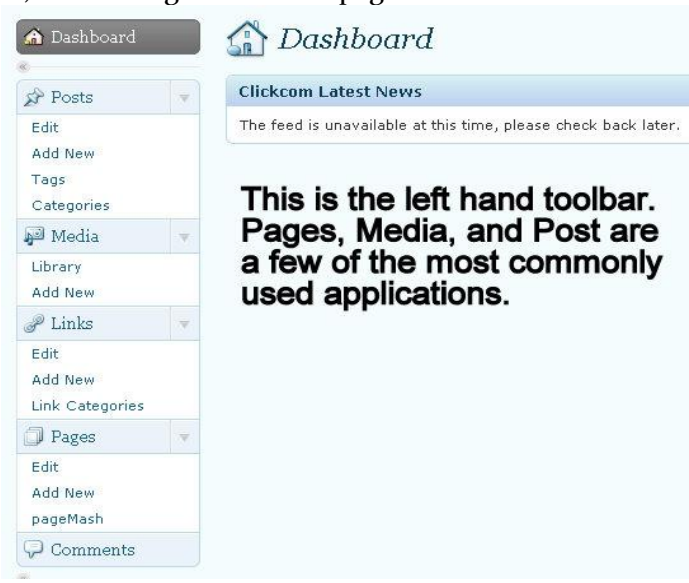
## Navigating the Dashboard

After logging in, you will immediately be taken to your Dashboard, which shows your categories in a column on the left hand side:




## Left-hand Navigation

- **Posts:** create and maintain "Blog Posts" here.
- (**Comments** is where you view and manage blog comments).
- **Media:** add images, movies, PDFs and other documents .
- **Links:** Only Advanced Users should access this application. This is *not* where you manage a 'links' page.
- **Pages:** add, edit, and manage their site's pages here.



# Pages

- "Edit" will bring up a list of current pages.
- "Add new" will auto-open a blank page screen.
- "pageMash" will bring up a list of current pages in SiteMap Outline format. You can see and easily edit parent/child page relationships using this function.

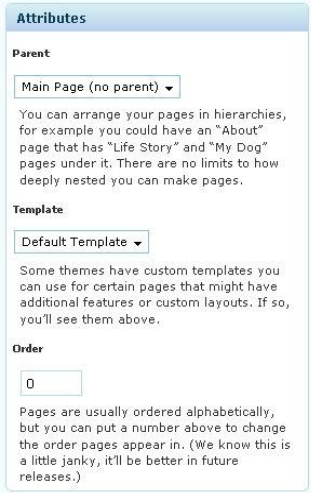
## Edit Pages

You may Publish, Delete, and change page settings in bulk directly from the "Edit" screen.

To access a page's specific editor screen, cursor over the page you want to edit, and click the "Edit" link below.

If you have many pages, use the "search" feature to find the page.

## The Editor's Right Hand Options


Attributes
Parent
Main Page (no parent)
You can arrange your pages in hierarchies, for example you could have an "About" page that has "Life Story" and "My Dog" pages under it. There are no limits to how deeply nested you can make pages.
Template
Default Template
Some themes have custom templates you can use for certain pages that might have additional features or custom layouts. If so, you'll see them above.
Order
0
Pages are usually ordered alphabetically, but you can put a number above to change the order pages appear in. (We know this is a little janky, it'll be better in future releases.)

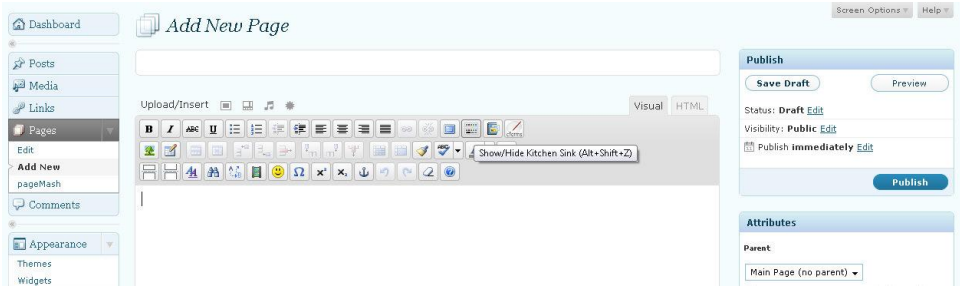
The Page editor lists many setting options to the right of the WYSIWYG editor.

These include:

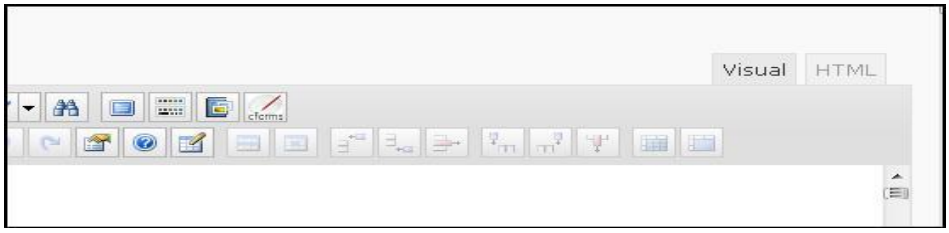
- The "Save Draft" feature, which allows you to save the content of a page without "Publishing" it for people to view.
- "Publish" (Later "Update") button to make a page's changes 'live'.
- "Visibility" settings, to set a page as *private, password protected,* or *public*.
- "Publish Immediately", with the option to publish on any date. (Bloggers use this when they publish blogs on a regular schedule each week for their subscribers to read. Instead of waking up in time to publish the blog they wrote last week, they can set the blog to automatically publish at 8AM Friday, for example).
- Determine a page's "Parent", you may also use pagemash.
- Do not adjust "Template" settings. Clickcom sets these for you.
- Determine Order, or use pagemash.

## Page "Editor" Screen

Insert headings, content, save drafts, publish a page, and edit Attributes.




And BEFORE you start editing, **always be in Visual (not HTML) mode** (top right corner of your page). Otherwise, the page will look very odd!




## Editor Buttons

- The Editor Buttons are very similar to MS Word.
- Most common buttons:
  - Hyperlink: to emails, outside sites, and pages within your site.
  - Anchor: Typically, a link to an article within the same page.
  - Insert Table
  - Insert bullets or numbered list.
  - Indent paragraphs.
  - Insert symbols.

## Previewing Pages

When you preview a page, WordPress essentially takes a snapshot of the editor box content when you hit "preview". It will have it's own URL. Hitting "refresh" will not update the preview URL to reflect additional changes. Simply exit out of the original "preview" screen and hit "preview" again to view changes.

## "Edit this entry"

This link appears at the bottom of every page and post viewed on the front-end of the website while an administrator is logged in.

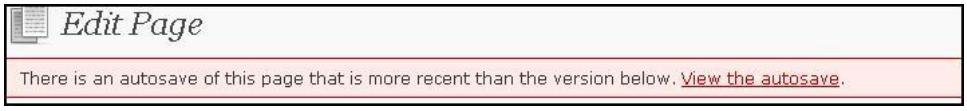
"Edit this entry" is a WordPress admin tool. It was designed to make blogs and sites easy to update, and clicking the link will pull up the post/page you are viewing into the Admin editor box.

This *only* happens when you are logged in to the admin. You can remain logged in for up to two days unless you specifically select the "Log Out" link in the top right of the Admin dashboard.

Rest assured this link is not visible via other computers.

## Accessing a Prior Revision

A pink autosave reminder box at the top of the page will indicate when a prior revision is available.




To recall a previous version of a page: Go to **Page Revisions**, choose the page you wish to restore and select Restore.

Page Revisions
6 April, 2009 @ 10:25 [Autosave] by admin
31 March, 2009 @ 16:08 by admin (delete)
31 March, 2009 @ 16:07 by admin (delete)
31 March, 2009 @ 16:05 by admin (delete)
31 March, 2009 @ 16:05 by admin (delete)
31 March, 2009 @ 15:41 by admin (delete)

## pageMash

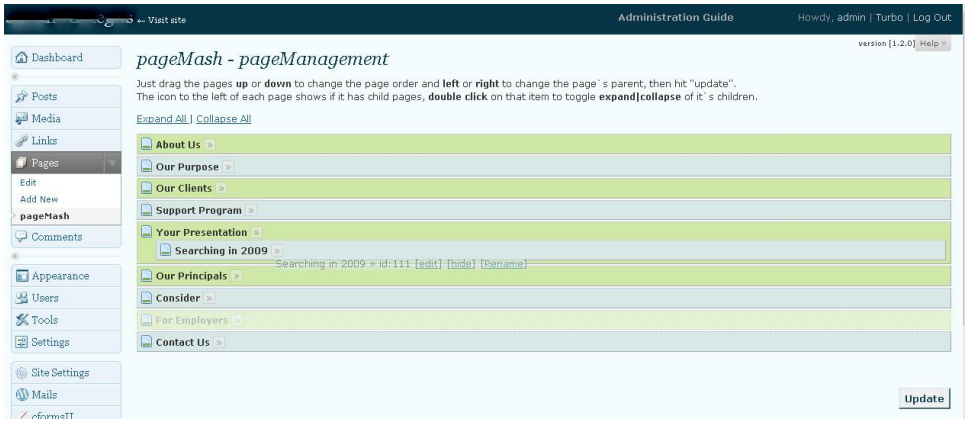
Cursor over the page title, and the >> icon beside it to see:

- "Edit" to open page editor screen
- "Hide" pages from main navigation bar. What does this do?
- "Rename" a page's button-name in the main navigation bar

Click & Drag Pages to:

- Establish order in main navigation bar
- Create parent/child relationships

ALWAYS click "Update" to apply pageMash changes! A red confirmation notice will flash in the bottom left corner.




## Hiding Pages

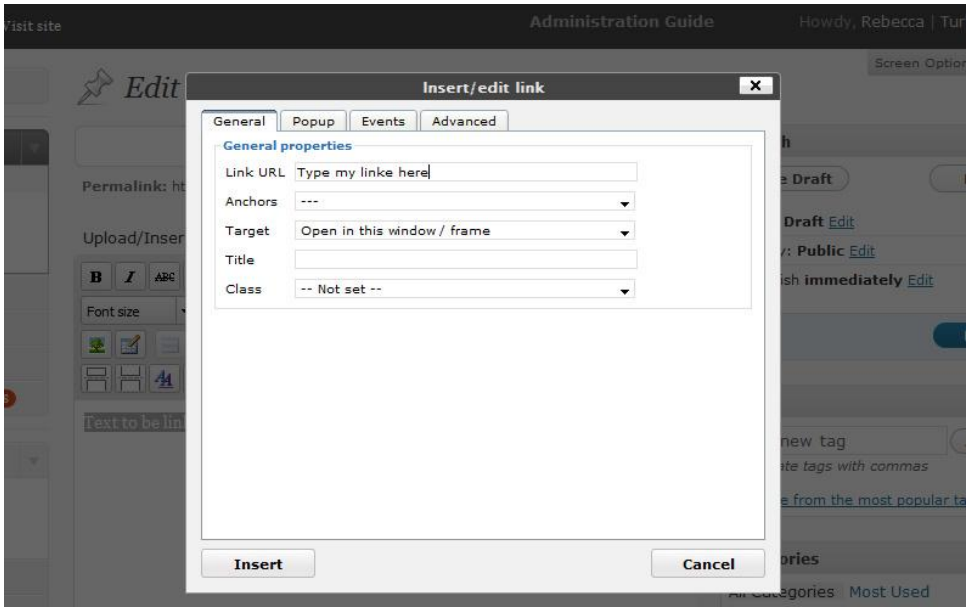
"Hiding" a page essentially means you are excluding the link to that page from showing up in primary and sub navigation. Anybody with the URL can still see the page, or you can provide links to the page elsewhere on your site. It does *not* mean it is password protected or 'members only'.

To hide a page, go into pageMash under "Pages". Put your cursor over the page title and three link options will appear, *edit*, *hide*, *rename*. When you select "hide" the page will *grey out*. Select the hide link again to un-hide or "show".

# Inserting Links to…

## Other Pages

1. Type and highlight the text in the editor screen you want linked.
2. Click the link button (Located in the top right of the editor buttons)
3. Paste the URL, "Insert



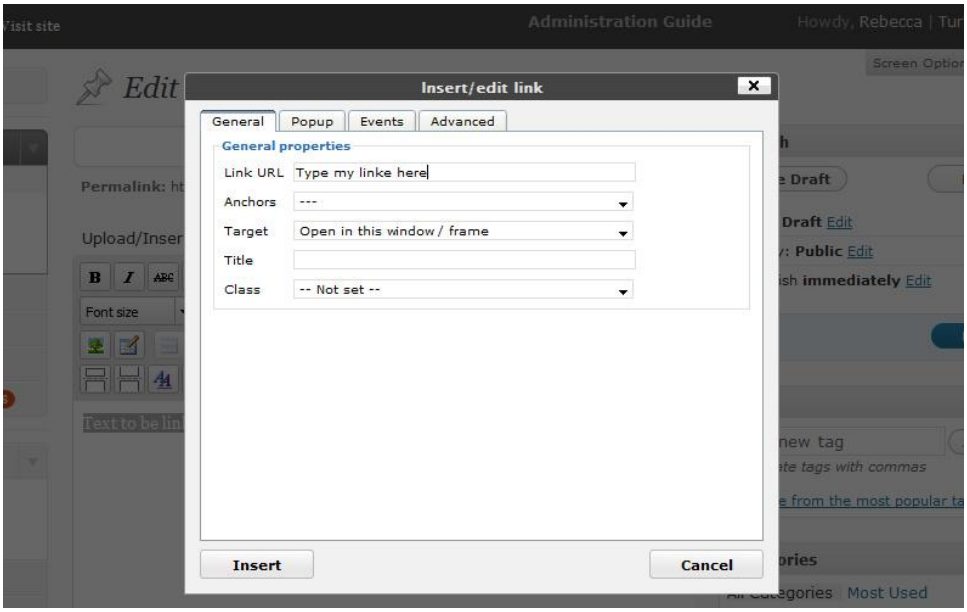

## Links Within my Site

1. Follow steps 1-3 above.
2. Instead of pasting the *whole* URL (starting with http://…) You only need to paste the last part of the URL, starting with the "/" following the domain.
3. Example: Instead of *mydomain.com/aboutus/ourstaff* I will only copy and paste */aboutus/ourstaff*
4. This is particularly true with ALL links inserted during the development domain phase. Links pointing to *mydomain.clickcom.com* domains will be broken once my site goes live.

## Links Within a Page on my Site

These are called "Anchors". They are frequently used on FAQ pages, where there is a list of questions at the top of the page, and clicking them will "drop" you down to the answer.

1. Put your cursor beside the DESTINATION (in an FAQ, the answer) and select the Anchor icon (bottom middle). Name the anchor and save/insert.
2. Highlight the text you want linked (the question) and hit the link icon.
3. Instead of filling out the "Link URL" field, select the name of the appropriate anchor. Insert.




## Link to a PDF

1. This is a 2 step process. First you need to get the *file URL*.
2. Click the "insert media" buttons (any of them will do, they all open the media library), find the media you want to attach, and click "show". Under the *Link URL* field click "File URL". Copy this URL.
3. Step 2: Highlight the text you want linked and select the *hyperlink* icon. Paste the *File URL* copied in step 1 and hit "insert"!

## Inserting Text from Web/Word

Never directly insert text into the editor! Doing so will copy extra "code" that will affect the appearance of the webpage.

Instead, use "Insert as Plain Text." Cut and Paste Text into this screen. It will automatically strip all code.

# Blog Posts & Comments

## What is a "Blog"?

A blog is simply time-stamped information. Blogs are a good way to reach out to your audience with up-to-date information about your company and industry.

Examples of how Clickcom Clients use Blogs:

- *Company News* page
- *Upcoming Events* page
- *Sales & Specials* page

Be creative! Blogs are a convenient way to keep your site viewers updated on your company, enhance your search engine rankings, and it's very easy for the website administrator to manage content on a regularly updated page.

## Should I "Blog"? Companies "Blog" for any number of reasons...

1. Blogs provide their audience with up-to-date information related to their field of work. This unofficially certifies the company as an 'expert' in their field and viewers will continue to traffic the website for new information.
2. Bloggers also use their blogs as a way to boost their rank in Google/Search Engine results.
3. Google "blogs" for more information!

## What about "Blog Comments?"

Blog Comments are *not* mandatory. Comment settings can be set at various levels of privacy in the Admin, including disabling the comment feature altogether.

To manage the comment settings site-wide, go to "Settings" >> Discussion. This screen will provide a number of privacy settings for you to select.

To manage a specific post's discussion settings, go to the post's editor screen and scroll down to the "discussions" box.

# Enable a Blog Page

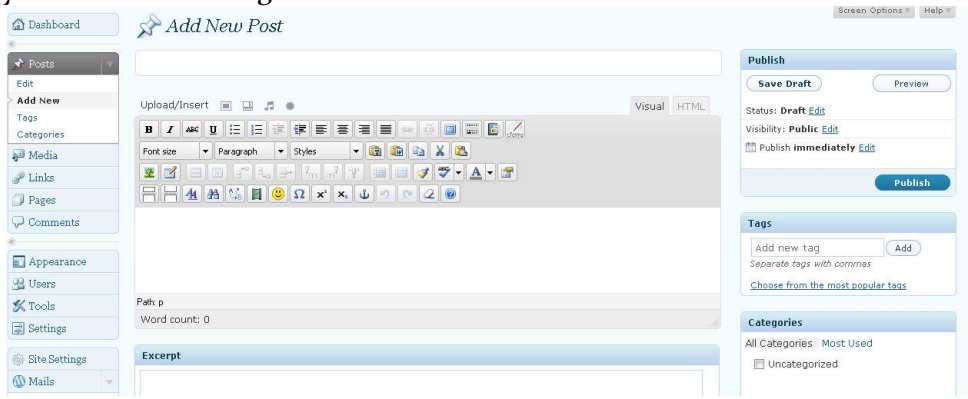
Create a new page using the "add new" function of the Page's section. NOTE: Any content you put on this page will not be visible once you complete the next step.

On the left sidebar, go to "Settings" >> "Reading". Next to "Post Page" select the page you just created.

## Add New Blog Post

The Post's editor screen and options are nearly identical to the Page's editor screen. Differences include:

- **The "excerpt" function** - When enabled, your blog roll (the list of your posts)
- **Categories Option** – If you use blogs to post information for multiple topics, you can sort them into categories. Add the categories in the "Categories" screen. From the Post page, assign your blog to the appropriate category. This will keep your blogs organized and easy for your viewers to navigate.




## Managing Comments

All Comments will show up under the "Comments" Icon. They may be sorted and edited as indicated here.

# Galleries

## Gallery Menu

The NexGen Gallery feature allows you to display your images in many different ways.

You can Add Galleries, which can be displayed as a *Gallery* (thumbnails in rows and columns), *slideshow* (Images scroll through at a rate determined in Gallery "Options"), or an *image browser* (A static image with arrows to the left and the right allowing site viewers to see previous or next images).

Multiple galleries can compile into an album. This adds another level of organization to your images.

Browse "Options" and Style setups for additional settings.

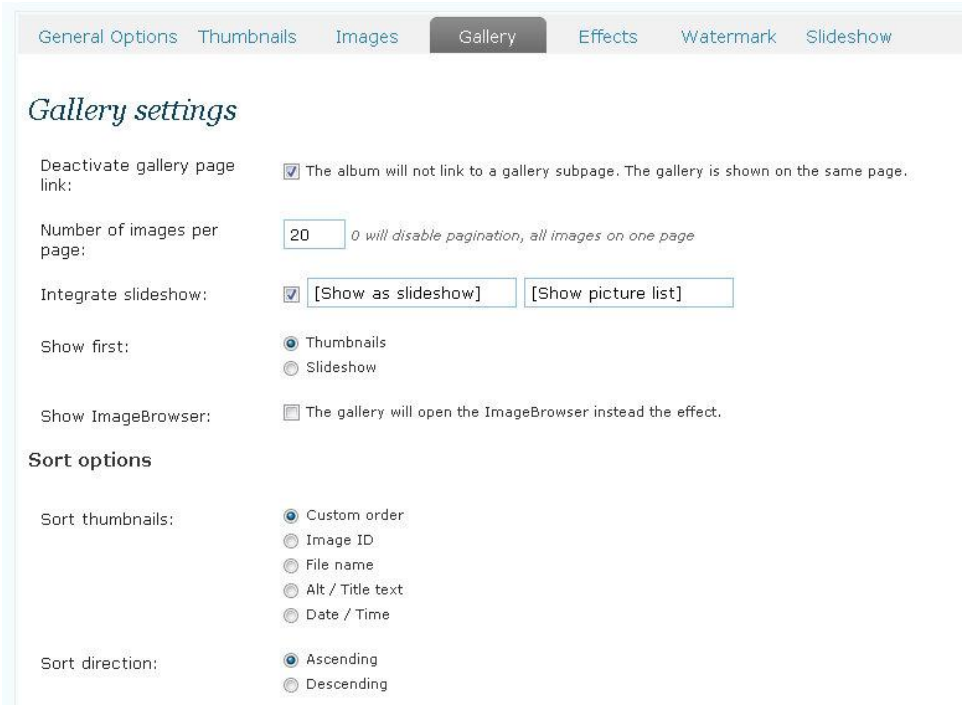
## Adding a New Gallery

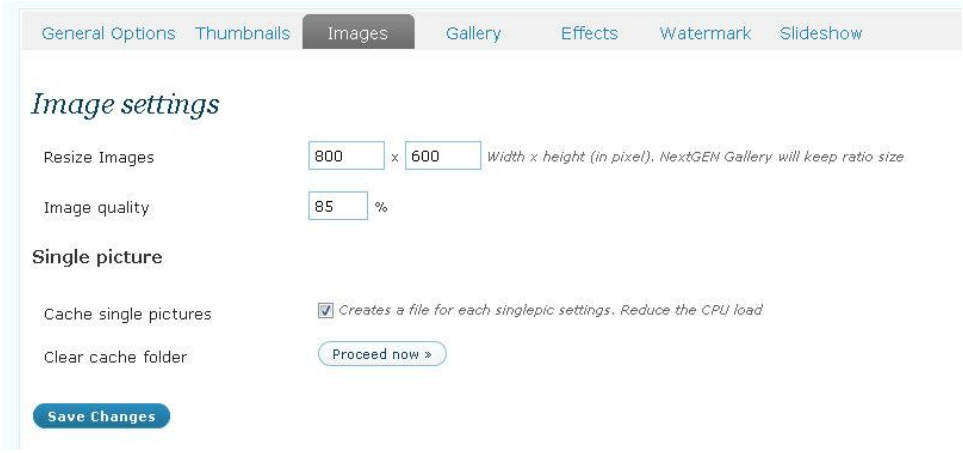
Add new gallery
Upload a Zip-File
Import image folder
Upload Images
Add new gallery
New Gallery:
Create a new , empty gallery below the folder wp-content/gallery/
( Allowed characters for file and folder names are: a-z, A-Z, 0-9, -, _ )
Add gallery

Name the Gallery, "Add"

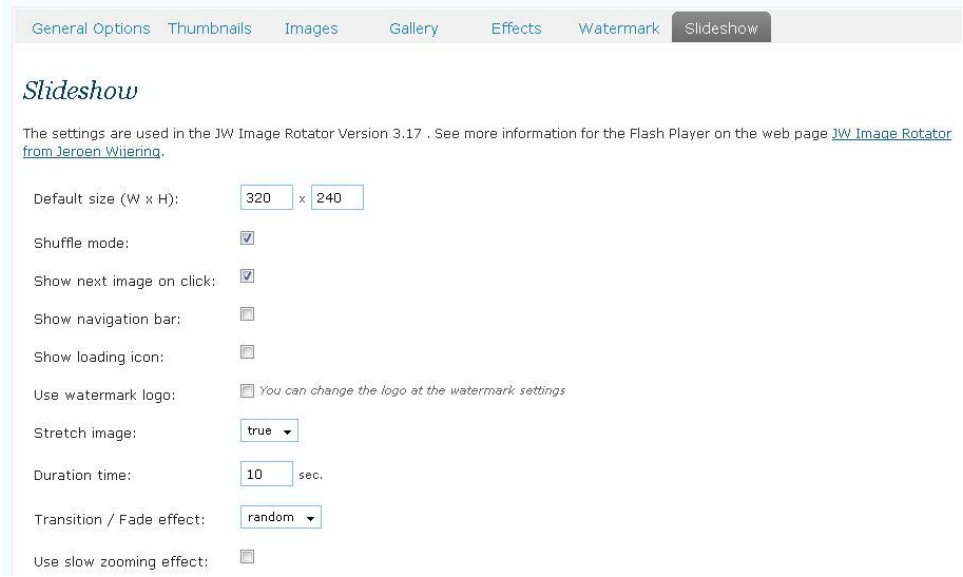
Upload Images to specified Gallery. Browse and select all applicable images, "Upload Images". You can add to any Gallery by uploading photos to it through the Gallery→Add New option.

## Gallery Settings



## SlideShows




## Uploading Gallery/SlideShow

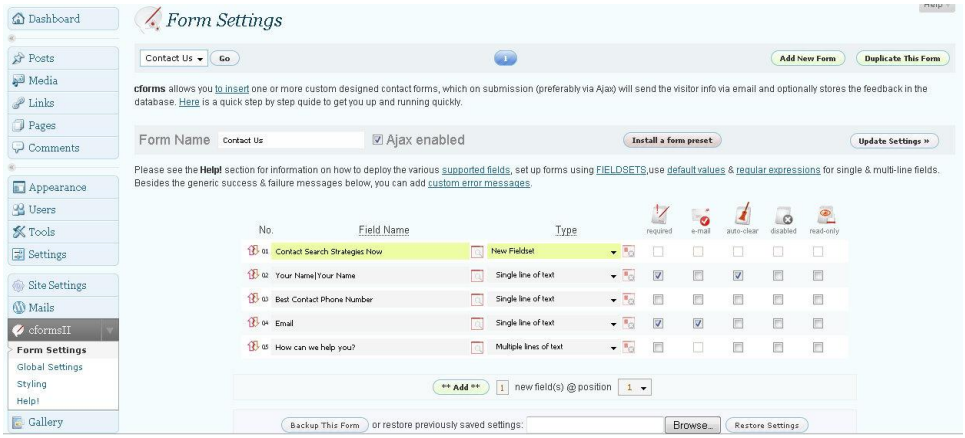
To upload a Gallery/SlideShow **to a page**, click on the icon from your tool bar. A Gallery "Short Code" will appear in the page editor. Preview the page to see the gallery or slideshow display.

## Cforms II

Cforms is short for “Contact Forms”; but you can create custom forms for all uses.

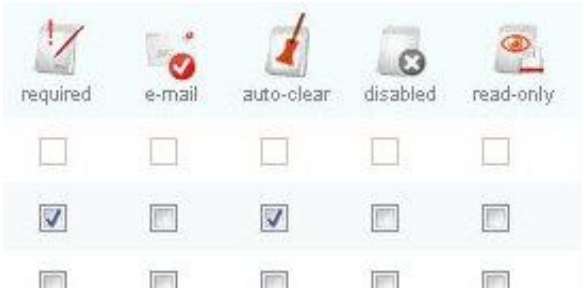
## Creating/Editing a Cform II

- Add as many fields as you like, then click and drag to designate their order.
- Name each field.
- Determine what response field you want.



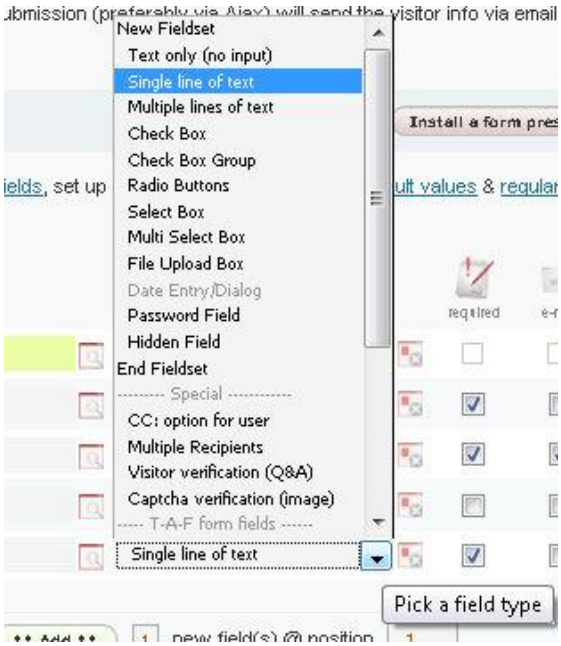

## Explaining Form Options

- “Required” – visitor cannot submit form without each *required* field filled.
- “Email” – requires a valid email address.
- “Auto-Clear” – provide text in a field that will auto-clear when a visitor selects the field.
- “Disabled” – Fields will be *grayed out* and cannot be edited by viewer.
- “Read Only” – Field cannot be edited by viewer.



## Popular Form Field Types

- Text Only (no input)
- Single Line of Text – One line response.
- Multiple Lines of Text – Larger written response.
- Check Box – Check 1 box.
- Check Box Group – Check multiple boxes.
- Radio Buttons – Select 1 'button'.
- Multiple/Select Box – drop down menu, selects 1 or selects multiple.
- File Upload Box – browse for file.
- Password Field – visual encryption **only**; does not make password secure.
- Hidden field – field not visible by submitter.
- Captcha Verification – prompts submitter to verify a series of letters or numbers.




## Form Email Options

You can determine various email Options under "Core Form Admin/Email Options" (directly below the list of fields).

From this screen you can determine *who* the form submissions email to, the email the form is "sent" from, and the email subject the submission will come to your inbox as.

## Auto Confirmation

Many ClickCom clients use the Auto-confirmation feature. If the form submitted requires a valid email, the auto-confirmation will send to the submitter thanking them (with a message of your choice).

Go to "Auto Confirmation" below the initial form settings. If it is not enabled, select the feature and save:

☑ **Activate auto confirmation**

You will then be able to input your auto confirmation subject and email.

## CForm Tracking

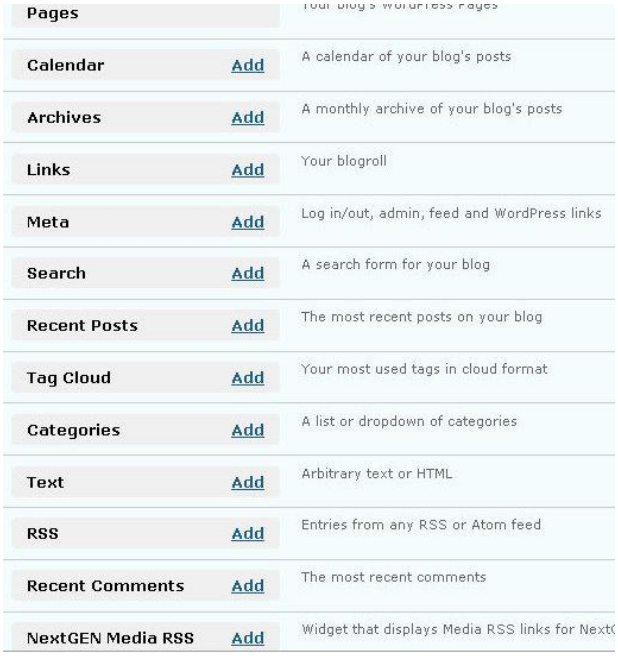
Cforms provides a "Tracking" option. To turn this on, go to Cforms >> Global Settings >> Database Input Tracking. Check this option, and "Update Settings"

**Enable Database Tracking** ☑ Will create two new tables in your WP database.

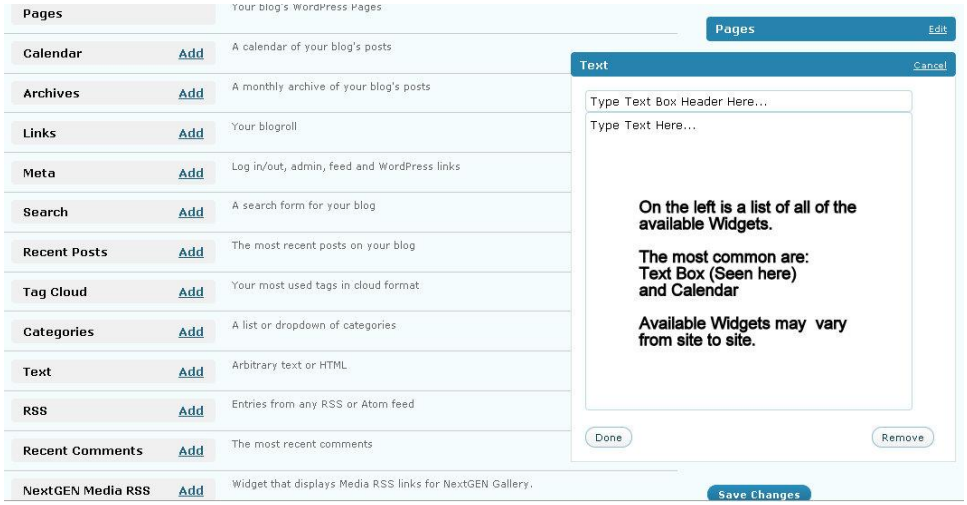
A new “Tracking” link will appear in the left hand Cform links. All submitted forms will send to the website administrator, AND save a copy here. You can view individual form submissions, or export them all.

## Widgets

- Widgets can be almost anything!
- Some ClickCom websites will have ‘spots’ for widgets.
- Widgets are an ‘object’ we build into themes and are *specific to each client*.
- Widgets vary based on the design of your site.
- ClickCom will notify you if Widgets are a part of your site design, and show you where to edit them.




## Text Box Widget



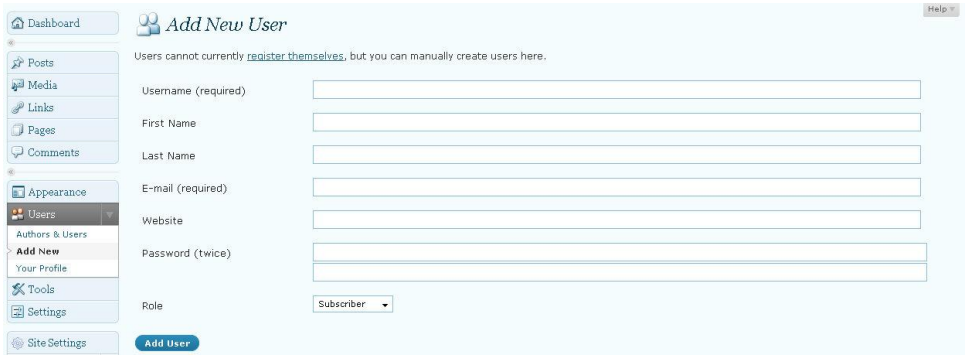
# Users

## Managing Authors and Users

- What is a "User"?
- Admin can create new users. This allows for separate usernames and passwords for multiple website administrators.
- "Users" can have access to *locked* pages
- "Users" can have varying levels of ability:
    - Administrator – Can access site admin
    - Editor – Has a restricted view of the admin
    - Author – Can write posts, but cannot edit others' posts.
    - Contributor – Can contribute to blogs, but cannot edit. Contributions must be approved.
    - Subscriber – reads blogs

## Adding a User

"Add New" Users by entering and submitting the following data:




## View or Edit Users

All users will show up here. Edit their "Role", User information, and more.

# Miscellaneous Help

## All in One SEO Pack

Wordpress allows for SEO settings site wide, and directly from individual posts and pages.

To change site settings, go to Settings >> All in One SEO. You can determine Site meta tags and more.

To determine settings page-by-page, enter the individual page's editor. Scroll to the bottom of the page and select "All in one SEO". Determine the page's meta tags, their descriptions, and their keywords.

## Embedding Videos (YouTube)

1. Find the Video on YouTube you want embedded (Or upload your own video, using help materials provided by YouTube). My Example video is: http://www.youtube.com/watch?v=ZnehCBoYLbc
2. To the right of the video is a grey box with "URL" and "Embed" fields.
3. Click the "Customize" gear icon to the right of "Embed".
4. Select your size, boarder, and boarder color options.
5. Copy the "Embed" code.
6. In the Page Editor, click the top right tab that says "html".
7. Paste the "Embed" Code and Save!

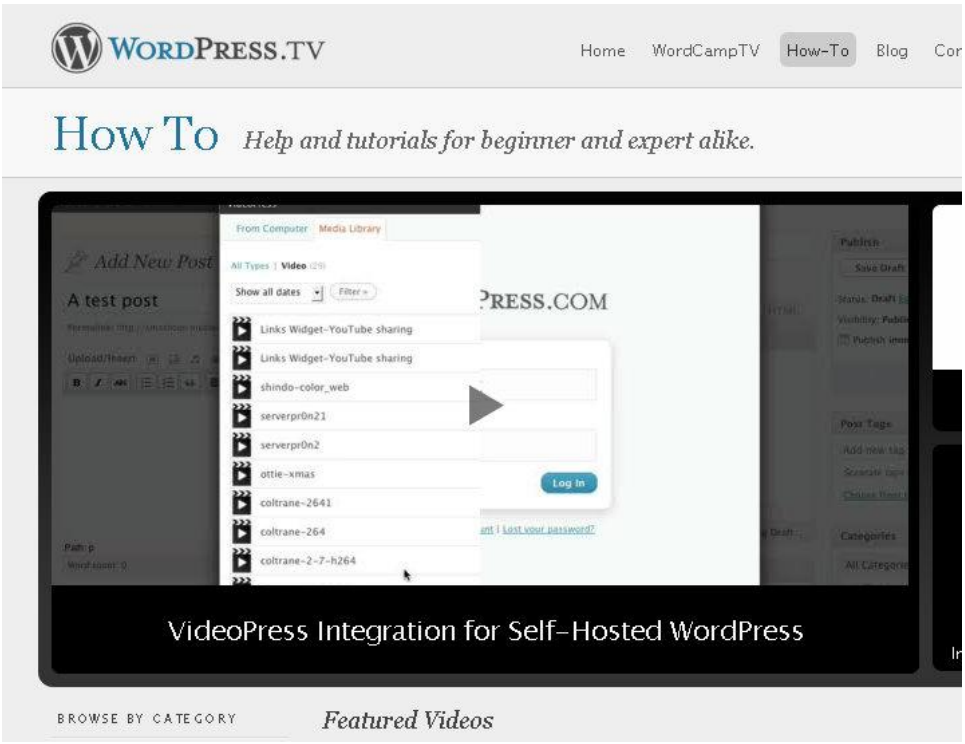
## Embedding Google Maps

1. Run a Google search for the address.
2. Click "Maps" to view the map to the address in full screen.
3. Hit "Link" in the top right of the map screen.
4. Copy the second field, the embed html. (Or follow the 'customize' link to select your size preferences, then copy the embed code)
5. In the Page Editor, click the top right tab that says "html".
6. Paste the "Embed" Code and Save!

## For WordPress Help…

http://wordpress.tv/

WordPress.tv *is* Your Visual Resource *for* All Things WordPress!




* WordPress.tv does not include resources on ClickCom Plug-ins and Applications

## For More Help…

Download the WordPress User Manual, available at the ClickCom website: http://clickcom.com/helpfiles.html

Register for FREE WordPress Training.

Email Technical Support, support@clickcom.com

Or, Contact your Sales Representative for individualize training, sales@clickcom.com